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ABSTRACT

The extent of electronic learning (eLearning) was examined in an online survey to which 650 individuals responded. Of the responses, 84% were from European Union countries; 9% were from elsewhere in Europe; 5.5% were from the rest of the world; and nearly 2% did not specify a country. The types of responding organizations included universities/colleges of further/higher education (21%), private training companies/organizations (18%), public vocational education and training organizations (15%), and private/public organizations with internal and external training services (11%). The responses established that as a part of total training supply revenue, electronic learning is rapidly increasing its share of total materials revenue from around 23% in 1999 to around 38% in 2001, whereas the proportion of all revenue from capital accounted for by electronic learning has remained flat at around 50% between 1999 and 2001. Other findings were as follows: (1) demand for electronic learning and expenditure by training users/purchasers of electronic learning materials are expected to grow rapidly across Europe; (2) electronic learning methods are most common for training in information and communication technologies, management, and new product or service training; and (3) companies with 50 or fewer employees tend to make greater use of electronic learning methods than larger companies do. (MN)

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CEDEFOP

eLearning

"What is the extent of eLearning in Europe?"

Survey

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Brussels, 10-11 May 2001

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Introduction

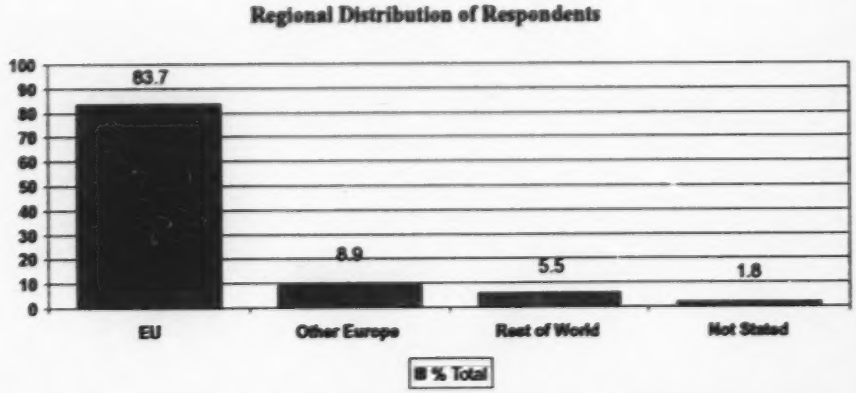
The demand for eLearning in Europe is growing, according to an online survey, 'What is the extent of eLearning in Europe'. The survey defines eLearning as all learning using information and communication technologies and is a major attempt to assess the development of eLearning in Europe.

Organisations, both large and small, from throughout the EU responded to the survey, providing evidence:

- of increasing demand for eLearning shown by the strong growth in training suppliers' revenues from the sale of eLearning materials last year, with stronger growth anticipated for 2001. In addition, expenditure by training users/purchasers on eLearning materials is also expected to grow rapidly;
- that eLearning methods are most common for training in information and communication technologies, management, and new product or service training;
- that smaller companies tend to make greater use of eLearning methods, while the proportion of training delivered by classroom methods tends to increase

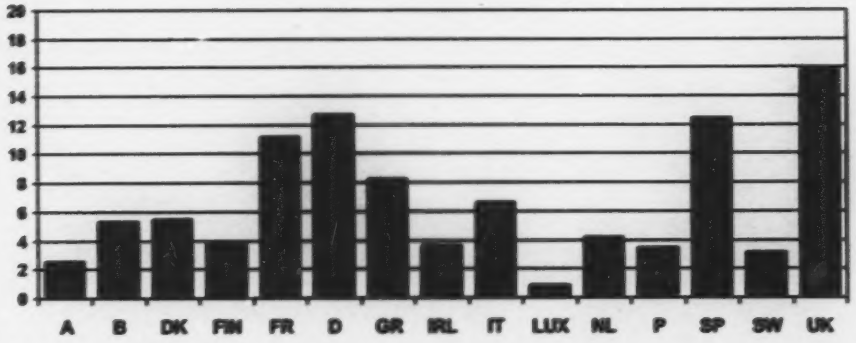
More details and data from the survey are provided below.

Who participated in the survey?



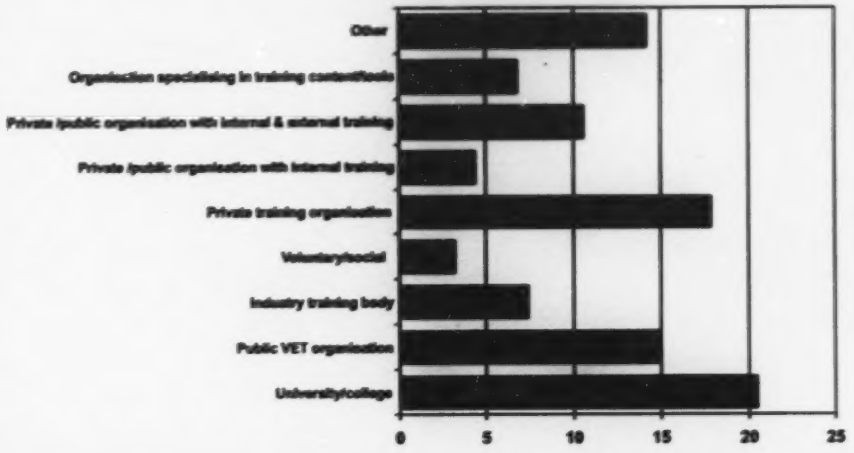
Of the 650 responses received so far, 544 (84%) were from EU countries; 58 (9%) from elsewhere in Europe; 36 from the Rest of the World (5.5%), while the remainder (almost 2%) did not state a country.

Distribution of Respondents by EU Member State
(% of Total EU Responses)

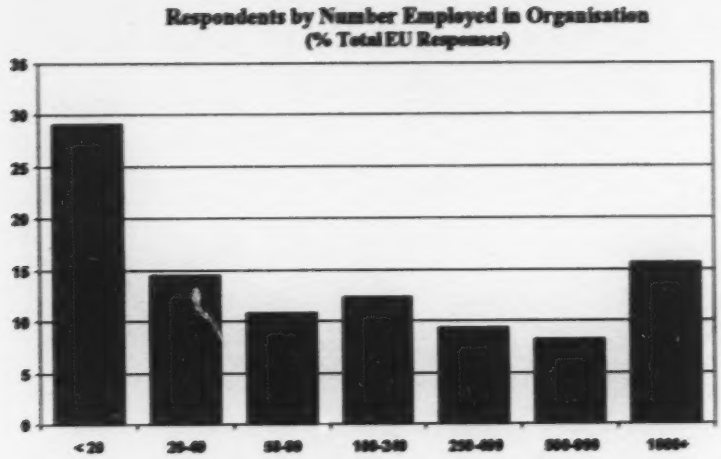


Within the EU, most responses came from the UK (87 responses, around 16%), followed by Germany (69 responses, 12.7%), Spain (68 responses,12.5%) and France (61 responses, 11.2%).

Respondents by Classification of Organisation
(% of Total EU Responses)

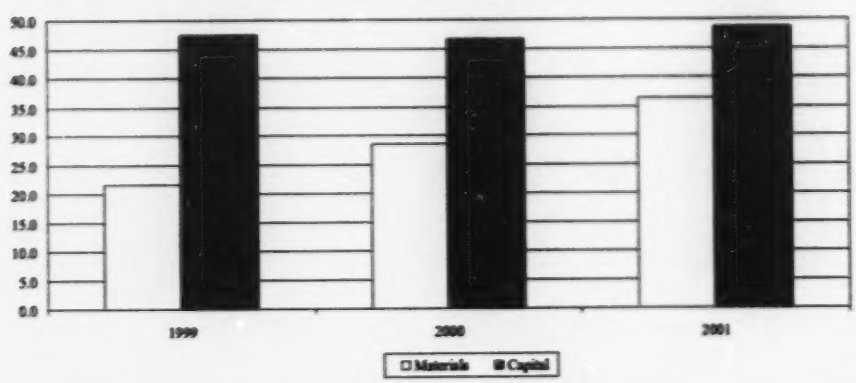


Different types of organisation responded to the survey. Most were universities/colleges of further/higher education (21%), with a good response rate from private training companies/organisations (18%). Other most common respondents were: public vocational education and training organisations (15%) and private/public organisations with internal and external training services (11%).



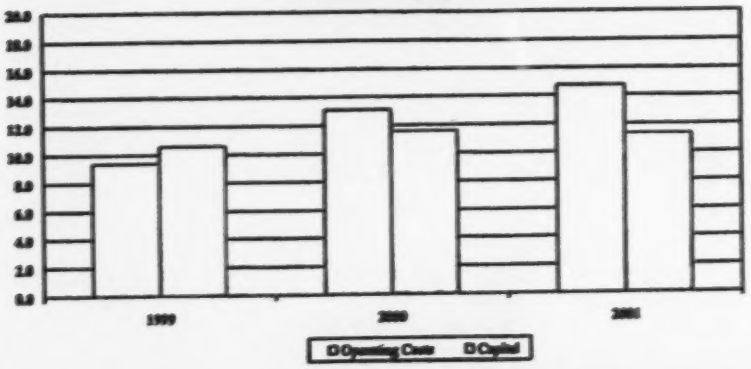
In terms of size of organisation, most responses came from very small organisations employing fewer than 20 people (29%). Almost 16% of responses came from organisations employing 1000 people or more.

Growing demand: revenue from and expenditure on training and eLearning



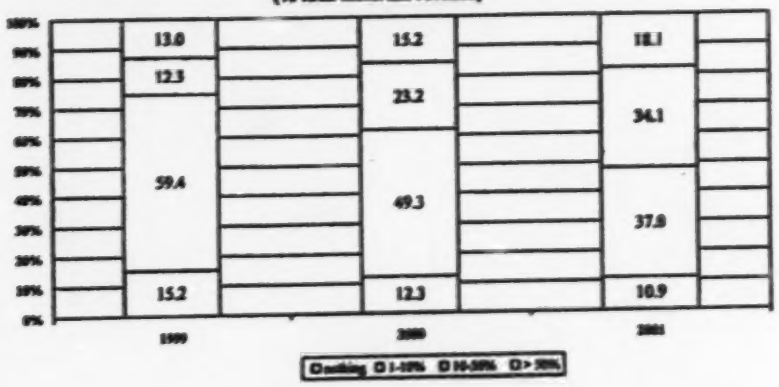
eLearning is rapidly increasing its share of total materials revenue from around 23% in 1999 to around 38% in 2001. In contrast, the proportion of all revenue from capital accounted for by eLearning has remained flat at around 50% between 1999 and 2001.

eLearning expenditure as a share of total user training expenditure in the EU, 1999-2001 (%)

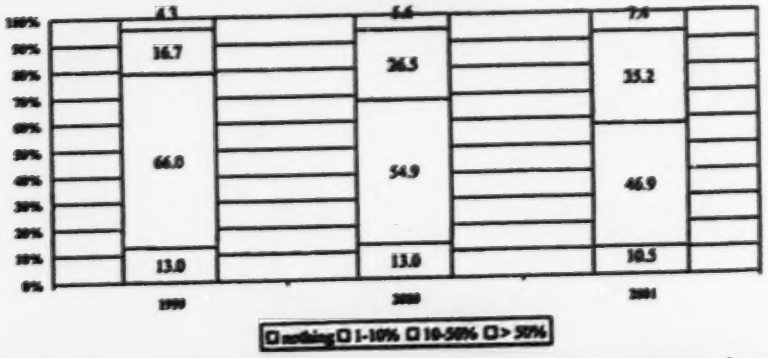


eLearning expenditure on operating costs as a proportion of all operating costs for all forms of training will increase gradually from 9.5% in 1999 to almost 15% in 2001. eLearning capital costs as a proportion of all capital remain flat at around 11% over the period.

eLearning materials revenue share among training suppliers in the EU, 1999-2001 (% total materials revenue)



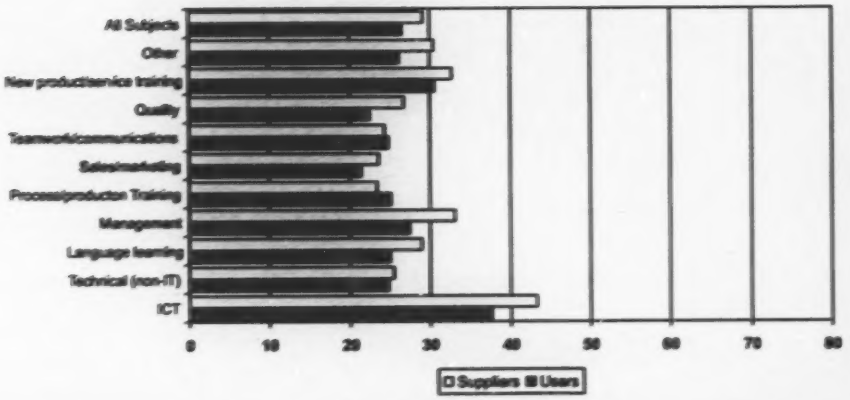
eLearning operating expenditure share among training users in the EU, 1999-2001 (% total operating expenditure)



Of those organisations who gave information on overall training revenue and costs, an increasing proportion of total training revenue/expenditure comes from/is spent on eLearning.

Delivery and receipt of training/eLearning

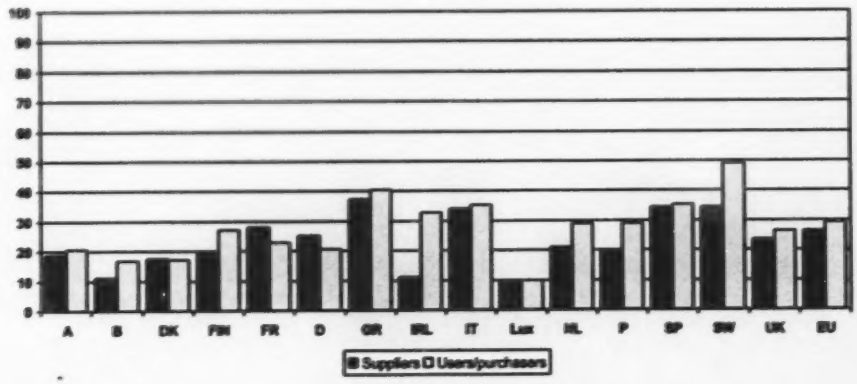
Proportion of eLearning-delivered training by subject in EU (%)



There is some variation by subject areas in which eLearning methods were used and supplied. Training using eLearning methods is most common for ICT, where 43% of user's needs were met by this form of training. On average a third of purchasers training needs were met by eLearning in management and new product/service training.

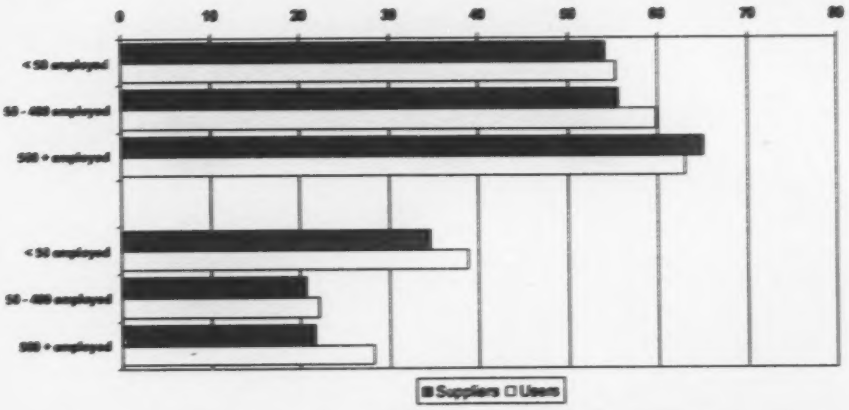
For half of the subject areas eLearning accounts for around a quarter of all training requirements among suppliers, with sales and marketing the area in which eLearning methods are used the least (21%).

Proportion of elearning-delivered training by EU Member State (%)



According to the survey, eLearning methods are used most widely in Sweden (almost 50% among users; around 34% among suppliers) and Greece (just over 37-40% of requirements for suppliers and users respectively). eLearning is also relatively widely used in Italy and Spain (both over 30% for suppliers and users alike).

Proportion of classroom and eLearning delivered training by size of organisation in the EU (%)



eLearning tends to be much more widely used/purchased in smaller organisations with fewer than 50 employees - 39%.
Similarly eLearning is more likely to be supplied by smaller organisations (35% in organisations with fewer than 50 employees).

Some conclusions

The survey indicates that:

- demand for eLearning is increasing across Europe. Revenue and expenditure patterns point to an increase in the supply and purchase of eLearning materials;
- eLearning is big business for small firms as both suppliers and users;
- eLearning methods are used mostly in the area of training in information and communication technology, management and new products and services.

However, how much of anticipated growth in revenue from and expenditure on eLearning will be translated into actual demand? Is eLearning more attractive to small firms because of its flexiblity? Will it be limited to a certain set of subjects?

These questions illustrate the need to know more.

Methodology

The survey carried out by Cedefop and Alphametrics, a UK-based consultancy, was launched on 30 January 2001 and the data shown represents 650 responses received by 25 April 2001. It is hosted by the Electronic Training Village (www.trainingvillage.gr) managed by Cedefop and published in Spanish, German, English and French. Responses are analysed by organisation type, size, location, whether they are eLearning suppliers or customers or both, the subjects of eLearning courses, as well as revenue from, and expenditure on, eLearning activities. The survey is open until the end of May 2001.

This information is electronically available at www.trainingvillage.gr

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